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Global Agricultural Information Network

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Approved By:

Daryl A. Brehm

Prepared By:

Roselyne Gauthier

Report Highlights:

Socio-economic and demographic changes are altering food trends in France. French consumers desire food products offering new tastes, increased health benefits and greater convenience. They also buy more ready-to-eat foods. France offers market opportunities in a number of areas such as fish and seafood, processed fruits and vegetables, beverages, tree nuts, confectionery products, wild rice, as well as kosher and halal foods.

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This report, prepared by the USDA's Foreign Agricultural Service for U.S. food products exporters, presents a comprehensive guide to France's economic situation, market structure, exporter tips, and best prospects for high-value foods and agricultural products.

Note: Average exchange rates used in this report are:

Calendar Year 2006: US Dollar 1 = 0.796 Euros

Calendar Year 2007: US Dollar 1 = 0.730 Euros

Calendar Year 2008: US Dollar 1 = 0.6803 Euros

(Source: Paris Stock Exchange/European Central Bank)

SECTION I. MARKET OVERVIEW

1. Macroeconomic Situation

As a member of the G-20, the European Union (EU), the World Trade Organization (WTO), and the Organization for Economic Cooperation and Development (OECD), France is a leading economic player. With a \$2.9 trillion gross domestic product (GDP), France is the world's sixth largest industrialized economy. The French population of 64.3 million has a per capita income of \$44,457.

France is the eighth largest trading partner of the United States, according to the U.S. Department of Commerce. U.S. trade with France, including exports and imports of goods and services, was \$107 billion in 2008. The United States is the primary outlet for French foreign direct investment and is the third largest foreign investor in France.

Because of the economic crisis France's GDP increased a moderate 0.3 percent in 2008, compared with 2.3 percent in 2007. Economic growth is projected to be less negative than expected in 2009. The Government recently revised upward its GDP growth forecast for 2009 from a minus 3 percent to around minus 2-3 percent, because GDP is expected to grow in the third quarter after a 1.2 percent increase (annualized) in the second quarter led by resilient household consumption. Consumer prices decreased 0.2 percent annually in August for the fourth consecutive month. However, core inflation (inflation excluding volatile prices, notably food and energy prices) increased 2.3 percent annually, up from 2.2 percent in July. A major impact of the economic crisis is its impact on joblessness. Unemployment increased to 9.1 percent (9.5 percent including overseas territories) in the

second quarter. Despite the creation of government-subsidized contracts the unemployment rate is expected to increase to 10 percent by the end of 2009. The Government warned that the recovery is emerging fragile and in embryonic form.

2. French Agricultural Production and Consumption

In 2008, overall French agricultural production (excluding product subsidies) increased 2.6 in volume and 3.8 percent in value, compared to 2007: 10.9 percent in value for livestock production and minus 0.3 percent in value for vegetable production. The main reason for the rise in value was the boost in the animal production price, therefore, the price of milk decreased by 30 percent in 2008, compared to 2007. Poultry prices also improved (+14 percent), compared to 2007, due to growth in animal feed. Weather in 2008 was favorable for some crops, such as corn, rapeseed, but unfavorable for fruits and potatoes. The upsurge in grain production benefitted from increased yields. Wine production fell in volume, while champagne production remained stable; prices were relatively stable. Milk production remained stable and still under the quotas allocated for France, and poultry production slightly decreased (minus 0.7), compared to 2007. Prices for animal feed escalated in 2008 by 15 percent compared to the previous year due to an increase in the prices of raw materials used in their manufacture. Prices also mounted for fertilizers, as well as energy.

According to the French National Institute Statistics (INSEE), in 2008, total French household food consumption, excluding alcoholic beverages and tobacco, grew only one percent in volume, compared to 2.4 percent in 2007. This is the smallest growth since over ten years. To limit their consumption decrease, French households reduced their savings. Thereby, volume purchases in 2008 dropped by 2.3 percent for meat; 0.5 percent for fruits and vegetables; and 0.6 percent for alcoholic beverages and tobacco. Conversely, purchases slightly climbed for non-alcoholic beverages (+1.2); milk, cheese and eggs (+1.2); and fish and seafood (+2.5). It remained stable for bread and breakfast cereals.

A study prepared by the French National Institute Statistics (INSEE) indicated that French consumers doubled their consumption of ready-to-eat foods, including frozen foods, over the past 45 years. The most widely consumed ready-to-eat products are canned vegetables, including potatoes, as well as meat and fish-based products.

Since the beginning of calendar year 2009, French food consumption has been affected by the financial slowdown; not only by volume sold, but also in price. Consumers are more price conscious when purchasing food, which benefitted hard discounters and similar stores whose sales are on the rise.

3. Key Demographic Developments

As of January 1, 2009, preliminary estimates indicate a total population, including overseas territories, of 64.3 million. In 2008, immigration to France slightly increased to 76,000 persons, as compared to 71,000 persons in 2007, and remains one of the lowest rates in the European Union compared to total population. In 2008, total births in France and overseas territories amounted to 834,000, a six percent rise compared to 2007, with a maternity average age close to 30 years. Life expectancy remained stable in 2008: 77.5 years for men and 84.4 years for women. France is one of the few EU member states expected to experience population growth by 2050, estimated at 70 million, based on current demographic trends.

France: Population by Age Group (in millions)(*)
(As of January 1, 2009)

Year	Total	Less than 20 years	20 to 59 years	60 to 64 years	65 and more	From which 75 or more
1999	60.1	15.6	32.3	2.8	9.4	4.2
2006	63.0	15.8	34.1	2.8	10.3	5.1
2007 (p)	63.4	15.9	34.1	3.1	10.3	5.3
2008 (P)	63.8	15.9	34.1	3.3	10.5	5.5
2009 (p)	64.2	15.9	34.1	3.6	10.6	5.6

(*) Excluding overseas territories

P = Preliminary - Source: INSEE PREMIERE -

France: Demographic Evolution of Households (in millions)

Year	Number of Households
2004	25.4
2005	25.7
2006	26.1
2007	N/A
2008	N/A

Source: INSEE - Enquête Budget Famille

The latest census data is for 2006, but current trends indicate that the number of households should increase by an average of 228,000 per year through 2010.

4. Changing Food Trends

Socio-economic and demographic changes have resulted in significantly altered food trends. Trends show that French consumers desire food products that offered better taste, health benefits, and convenience.

- The "younger" generation, between the ages of 20 and 35 (26 percent), appreciates trying new products. This generation values products with an appealing image along with good taste.
- Food safety scares have raised consumer concerns about sanitation and safety issues. In turn, these concerns have led to greater demand for natural and organic food products--fruit juices, fresh and processed dietetic foods, organic produce, fish and seafood products, ethnic foods, and food supplements.
- Working consumers or those living alone (30 percent) are spurring demand for easy-to-prepare foods, single and double portion packs, and frozen or microwavable meals.

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Advantages and Challenges for U.S. Exporters in France

Advantages	Challenges
<ul style="list-style-type: none"> ▪ The population's rapid shift from rural to urban regions is boosting demand for international food. ▪ French per capita income is near that of the United States. ▪ The tourism industry increases demand for hotel, restaurant, and institutional products. ▪ U.S. fast food chains, theme restaurants, and the food processing industry occasionally demand American food ingredients. ▪ Efficient domestic distribution systems. ▪ Weakness of the U.S. dollar vis a vis the Euro. ▪ American food 	<ul style="list-style-type: none"> ▪ Food scares and other food safety issues cause concern among French consumers. ▪ French consumers are exacting when it comes to quality and innovation. ▪ Price competition is fierce. ▪ Certain food ingredients are banned or restricted in the French market. ▪ Marketing costs to increase consumer awareness are high. ▪ Mandatory customs duties, sanitary inspections, and labeling requirements can be onerous. ▪ The EU biotech labeling requirement of 0.9 percent excludes many U.S. processed products.

and food products remain quite popular.	<ul style="list-style-type: none"> ▪ Lack of a US-EU organics equivalency agreement hinders the organic trade.
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SECTION II. EXPORTER BUSINESS TIPS

1. Trade Barriers and Restrictions

- Most processed products are subject to additional import charges based on sugar, milk fat, milk protein, and starch content.
-
- Efforts to harmonize EU import regulations and to implement commitments under the WTO may abolish inconsistent and conflicting French and EU regulations, quota conversions, variable levies, and restrictive licensing requirements.
-
- French regulations can limit market access for certain U.S. agricultural products including, but not limited to, the following:
 -
 - Enriched flour
 - Bovine genetics
 - Exotic meat (alligator)
 - Flightless bird meat (ratite)
 - Live crayfish
 - Beef and bison meat
 - Certain fruits and vegetables
 - Pet foods
 - Co-products derived from genetic modification

For more information on product trade restrictions, food standards, and regulations, please refer to the EU and FAS/Paris Food and Agricultural Import Regulations and Standards Report (FAIRS) report: <http://gain.fas.usda.gov/Lists/Advanced%20Search/AllItems.aspx>.

France, as an EU member state, benefits from EU customs union agreements with Turkey and Andorra, 26 free trade agreements under either GATT Article XXIV or GATS Article V. The European Union has preferential trade agreements with Norway, Iceland, Switzerland, Liechtenstein, Israel, the Palestinian Authority, Tunisia, Morocco, Jordan, Egypt, Lebanon, Syria, Algeria, Mexico and South Africa. The European Union provides African, Caribbean and Pacific developing countries (ACP) with non-reciprocal preferential access to its

markets under the Cotonou Agreement, and gives other developing countries preferential access under the Generalized System of Preferences (GSP).

2. Consumer Tastes, Preferences and Food Safety

Like U.S. consumers, France's consumers desire innovative foods. Consumers like ethnic and exotic foods with distinctive themes and flavors. In 2008, eighty-five percent of the residents consumed an exotic or ethnic meal at least once. The European market for specialty and ethnic products is growing annually at 15 percent, valued at \$265 million (excluding fresh products) in 2007. Data for calendar year 2008 is not available. Theme restaurants have dramatically increased. In Paris, one of every two new restaurants is based on a "world food" concept, and all major supermarket chains offer ethnic foods under their private labels. In the ethnic segment, consumers seek new products, and look for quality and innovation. The trends favor Thai, Japanese, Northern and Southern African, Indian cuisine, but also Middle Eastern fast food specialties (kebabs). Tex-Mex, Cajun, or California-style cuisine, sports drinks, and vitamin enriched snacks have potential, as do ready-to-eat products such as frozen foods, seafood (particularly salmon), wild rice, innovative dietetic/health products, organic products, frozen desserts. Kosher and halal foods are also increasing in popularity. Recently, finger foods are also becoming popular in Paris. Finger foods represent opportunities for ethnic foods.

While many consumers and distributors are receptive to new developments in food products, they request information on product contents and manufacturing processes. France has labeling requirements for both domestically-produced and imported food products containing genetically-modified products or biotech-derived ingredients or additives harmonized at the EU level.

The French Government encouraged the development of quality marks such as "Label Rouge" (Red Label) for meats, poultry, and fruits and vegetables, which guarantees production under established conditions. Product origin labels were also established, which guarantee that certain wines, milk, butter, or cheeses were sourced from a certain region. The government also oversees a certification program which guarantees that product preparation, manufacturing, and packaging processes follow certain specifications. These quality and origin marks have been well received by French consumers. The organic food program certifies that agricultural and food products were manufactured without prohibited fertilizers and according to special criteria. In 2004, the Government of France launched the Organic Agriculture in 2012 program. This program supports the organic sector by including 15 million Euros over a five year period, plus 2 million Euros for food industries, with a view of reaching 20 percent organic food products in the food service sector by

2012. Recently, the French Minister of Agriculture announced new support measures to farmers converting from traditional agriculture to organic, the goal being to triple organic agriculture to reach six percent of total agricultural production by 2012.

3. Marketing Strategies for the French Market

(a) U.S. food product exporters should consider:

Market access restrictions and food laws

- Check EU and French regulations to ensure products are allowed to enter the French market and carefully verify the list of ingredients and additives.
- Verify customs clearance requirements and any additional import charges based on percentage of sugar, milk fat, milk protein and starch in the product.

Consumer characteristics

- Target dual income families, singles, senior citizens, and health and environmentally-conscious consumers.
- Influence consumer choices mostly through advertising campaigns.

Seasonal characteristics

- Holiday promotions
- In-store supermarket promotions

Unique U.S. products characteristics

- High quality
- Regional specialties (i.e., Florida grapefruit, California wine, Tex-Mex or Cajun style, New England seafood, etc.)

Image appeal

- Packaging could help a product find a niche in this market, particularly if the U.S. firm has access to stores and supermarkets that specialize in U.S. or foreign foods.

Trade Shows and In-Store Promotions:

- In-store product demonstrations can help familiarize French consumers with U.S. food products.
- Trade shows are an excellent way to introduce new products to the market.

(b) Successful Export Planning for Your Products:

- Contact the Office of Agricultural Affairs at the American Embassy in Paris to obtain up-to-date information on local government regulations, customs duties,

politics, demographics, infrastructure, distribution channels, and market size.

- Conduct basic market research and review export statistics for the past five years.
- Adapt products to local regulations, by giving the customer what they require. Check ingredients and package size requirements, research consumers' preferences, and ensure that the product is price competitive.
- Identify the best distribution channel for the product, i.e., supermarkets, importer, distributor, or a foreign agent. Be prepared to send samples.
- Work an agent, distributor, or importer to determine the best promotional strategy. Be prepared to invest in the market promotion (through trade shows, in-store promotions or advertising campaigns, to gain maximum exposure and make valuable market contacts).

Note: Promotional assistance is available for U.S. products through a variety of branded and generic promotion programs through the four state regional trade groups: FOOD EXPORT USA-NORTHEAST, SUSTA, WUSATA and FOOD EXPORT ASSOCIATION OF THE MIDWEST USA. (Addresses, telephone, fax and contact information for these groups are listed in Section V., Appendix B., of this report).

4. General Import and Inspection Procedures

General Import Requirements

Import and export transactions exceeding 12,500 Euros (approximately \$17,124) in value must be handled through an approved banking intermediary. Goods must be imported or exported no later than six months after all financial and customs arrangements have been completed.

For products originating in countries other than EU member states or participants in the WTO, and for a limited number of products considered to be sensitive, a specific import/export license may be required by product or by category of products. Otherwise, the following shipping documents in French are required:

- Commercial invoice;
- Bill of landing or air waybill;
- Certificate of origin
- Sanitary/health certificate (for specific products)

U.S. exporters must make sure their products comply with French regulations and must verify customs clearance requirements with local authorities through their contacts before shipping the products to France. The Office of Agricultural Affairs of the American Embassy

in Paris can provide assistance and information on these matters.

- **Basic Labeling/Packaging Requirements:**

- Labels should be written in French and include the following information:
 -
 - *Product definition*
 - *Shelf life: indicate "used by" and "best before" dates and other storage requirements*
 - *Precautionary information or usage instructions, if applicable*
 - *Statement of contents: ingredients, weights, volumes, etc., in metric units. All additives, preservatives and color agents must be noted on the label with their specific group name or their "E" number*
 - *Product's country of origin and name of importer or vendor within the EU*
 - *Manufacturer's lot or batch number*
- According to the T&L regulation, biotech products and biotech-derived products must be identified "from the seed to the fork" at each stage of market release. A unique code will be attributed to each genetic event to facilitate communication among operators. The T&L regulation imposes the labeling of any food or feed product derived from biotech, whether biotech DNA is detectable in the final product or not. The threshold under which labeling is not compulsory is set at 0.9% for both human food and animal feed. A threshold on planting seeds has not yet been established. For more details, see the French Ministry of Agriculture website on biotech: <http://ogm.agriculture.gouv.fr>, as well as the French decree implementing EU Regulation which can be found at: <http://www.legifrance.gouv.fr/WAspad/UnTexteDeJorf?numjo=ECOC0400078D>
-
- More detailed information on labeling and packaging requirements may be found at:
 - <http://www.fas.usda.gov/gainfiles/200808/146295368.pdf>
 -

Customs Process

-
- A person or company can facilitate customs clearance for imports so long as they can present to the French Customs Authorities at the port of entry or at the airport, with the imported goods and the necessary accompanying documents. To ease the clearance process, the U.S. exporter should have the customs clearance done by either a forwarding agent or his importer/distributor or agent in the country of destination. More information may be obtained from the General French Customs Authorities listed in Section V, Appendix C, of this report.

- Generally, a visual inspection consists of verifying that the products are accompanied by the correct shipping documents.
- A detailed inspection may include sampling or a chemical analysis test.
- The speed of the customs clearance procedure can depend on the quality of U.S. exporters' documentation.
- When released, the foodstuffs are subject to an ad valorem customs duties levied under the Common External Tariff. Duties differ according to product. Also, in addition to customs duties, foodstuffs imported into France are subject to a Value-Added Tax (VAT). Currently the VAT is generally charged at one of the two following rates:
 - Standard rate of 19.6 percent applies to alcoholic beverages, some chocolates and candies
 - Reduced rate of 5.5 percent applies mostly to agricultural and food products.

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

1. The French Food Industry

French food industry sales increased only 5.5 percent in 2008, compared to over 7 percent in 2007. Despite price increases, the overall French food industry showed a decline linked to household food consumption and decreased exports at the end of 2008. The first quarter of 2009 showed a strong decline compared to 2008, and French food industry representatives reported a decline in order books, increase stocks, mainly for dairy products. Production is predicted downward during the second quarter of 2009.

- The food industry is the largest French industrial sector (162.9 billion Euros - \$239.4 billion -) far ahead of the automobile and electronic sectors. France is the world leader in processed food exports, worth 35 billion Euros (\$51.4 billion) in 2008, approximately ten percent of the global trade in processed foods.
- France currently has 30 major food processors, and over 10,500 food industry companies, 70 percent of them small to medium-size companies.
- According to the French Food Industry Association (ANIA), in 2008, food processing sector sales were 162.9 billion Euros (\$239.4 billion), up 5.5 percent from the 2007 level.
- In 2008, the French food industry continued to restructure in the face of greater competition from large multinational groups.

- In 2008, total food exports were 35 billion Euros (\$51.4 billion), up 4.8 percent in value over 2007. Imports were 28.4 billion Euros (\$41.7 billion), up 11.8 percent in value over 2007.

**Major French Food Processing Sectors – Percentage growth
Calendar Year 2008/2007**

Food Processing Sectors	Production	Price	Sales	Exports	Imports
Grains	-6.5	17.3	14.1	5.9	15.8
Animal Feed	1.5	14.0	12.8	7.3	27.8
Canned Fruits & Vegetables & Fruit Juices	-3.8 (*)	4.3	3.4	-2.8	7.6
Meat Industry	-1.0	3.9	4.2	7.0	7.2
Seafood Industry	--	1.9	1.2	-1.6	0.8
Milk Industry	0.8	9.1	5.7	5.6	-4.5
Beverages Industry	-6.0 (**)	5.7	1.5	1.2	6.4
Fats and Oils	12.4	29.0	29.5	33.2	51.4
Other food industries	-3.8	4.9	4.6	5.0	9.6
Total Food Industries	-2.1	7.1	5.5	4.3	11.2

(*) Includes fruit juices

(**) does not include wine

Source: INSEE - National Account

2. Infrastructure Situation

France's transportation infrastructure is among the most sophisticated in the world, benefiting from advanced technology and a high level of investment by the government. The three main entry points for air-freight are Orly and Charles de Gaulle airports and Saint-Exupéry airport in Lyon. France has twelve major seaports, many of which are equipped for container ships. There is an extensive highway and river-transport system, and a state-owned rail network that is among the most comprehensive and technologically advanced in the world.

Communications infrastructure is similarly advanced. Telephone lines blanket the country and there is easy access to the Internet via French and foreign service providers. France is catching up rapidly to the U.S. and some other countries in the use of personal computers and the Internet. High-speed Internet access is expanding rapidly. The government promotes better use of information technologies.

3. Market Trends

The French market for food products is mature, sophisticated, and well served by suppliers from around the world. Additionally, an increasing interest in American culture, younger consumers, and changing lifestyles contribute to France's import demand for American food products. Generally, high quality food products with a regional American image could find a niche in the French market, particularly if they gain distribution through stores and supermarkets that specialize in U.S. or foreign foods. Niche market opportunities also exist for regional American foodstuffs (Tex-Mex, Cajun and California cuisine), candies and chocolates, wild rice, organic and health food products, as well as kosher and halal foods.

The French food service industry is moving towards fresh consumer-ready products at the expense of frozen foods.

4. Marketing U.S. Products & Distribution Systems

The United States and France produce many of the same goods and services and export them to each other. Therefore, marketing products and services in France can bear some resemblance to marketing in the United States. French business representatives are sophisticated and knowledgeable about their respective markets. At the same time, American firms must consider certain business practices, cultural factors, and legal requirements in order to do business effectively in France. For detailed information on the distribution systems and the best market entry approach for new-to-market exporters for the retail food sector, see Post Retail Food Sector Report:

http://gain.fas.usda.gov/Recent%20GAIN%20Publications/RETAIL%20FOOD%20SECTOR_Paris_France_7-17-2009.pdf

The Hotel/Restaurant Institutional (HRI) sector in France uses the services of wholesalers or processed food buyers, and the well developed distribution channels of the wholesalers/importers are often the key to getting a new food product into that sector. A report on the HRI sector in France can be viewed at:

http://gain.fas.usda.gov/Recent%20GAIN%20Publications/HRI%20FOOD%20SERVICE%20SECTOR_Paris_France_7-20-2009.pdf

SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS

There are significant market opportunities for consumer food/edible fishery products in a number of areas: fruit juices and soft drinks (including flavored spring waters), dried fruits and nuts, fresh fruits and vegetables (particularly tropical and exotic), frozen foods (both ready-to-eat meals and specialty products), snack foods, tree nuts, "ethnic" products, seafood (particularly salmon & surimi), innovative dietetic and health products, organic products, soups, breakfast cereals, and pet foods. In addition, niche markets exist for candies, chocolate bars, wild rice, kosher and halal foods. Market opportunities for U.S. exporters also exist for oilseeds, protein meals and other feeds, as well as for wood products and grains.

Listed below are six consumer-oriented food products considered by the Office of Agricultural Affairs as representing the "best prospects" for U.S. business.

Top 6 Market Opportunities for Consumer-Oriented Food Products (USD Million)

1. Name of Best Prospect: **FISH AND SEAFOOD, FRESH AND FROZEN**

HS Code: 03

(USD Million)

2006 2007 2008
----- January / December -----

A. Total Market Size	5,596	5,827	n/a
B. Local Production	2,170	2,537	n/a
C. Total Exports	1,626	1,901	1,978
D. Total Imports	5,052	5,357	5,779
E. Total Imports from U.S	237	229	240
F. Exchange Rate: Euros per USD	0.796	0.730	0.680

Source: French Customs – French Seafood Board (OFIMER)

Comments: France is a major consumer of seafood products and a net importer of many seafood products, because domestic production is significantly lower than demand. French seafood per capita consumption amounts to 35 Kg per year, including 68 percent finfish and 32 percent shellfish and crustaceans. In 2008, the United States was France's fifth largest supplier of seafood products after Norway, the U.K., Spain and the Netherlands, representing 4.1 percent of total imports. In January-July 2009, U.S. seafood products exported to France mainly consisted of frozen Alaska Pollock fillets, fresh and frozen scallops, frozen surimi base, live lobster, and frozen salmon.

2. Name of Best Prospect: **PROCESSED FRUITS AND VEGETABLES, INCLUDING
FRUIT JUICES**

HS Code: 20

		(USD Million)		
2006	2007	2008		
-----	January / December	-----		
A. Total Market Size		9,756	12,059	12,742
B. Local Production		8,562	10,705	10,877
C. Total Exports		1,226	1,025	1,513
D. Total Imports		2,420	2,379	3,378
E. Total Imports from U.S.		60	54	51
F. Exchange Rate: USD 1.00=Euros: 0.796		Euros: 0.730	Euros: 0.6803	

Source: French Customs/SCEES - French Ministry of Agriculture

Comments: Fruit juices and soft drinks are currently the most dynamic growth sectors among non-alcoholic beverages, with per capita consumption of fruit juices estimated at 28 liters per year. The French fruit juice market is very sophisticated due to the experience of distributors, variety of packaging, diversity of flavors and quality types, product innovation, advertising investment and promotions, as well as price ranges. According to French Customs statistics, in 2008, French imports of fruit juices totaled about 813 million Euros (\$1,195 million). The primary imports from the United States consisted of fresh and frozen orange and grapefruit juices, and totaled \$14 million. Competition in the juice sector is very strong, principally from Brazil, Israel and Spain, which benefit from preferential tariffs.

3. Name of Best Prospect: **BEVERAGES, INCLUDING MINERAL WATER,
BEER, WINE AND SPIRITS**

HS Codes: 22.01 to 22.06 and 22.07+22.08

(USD Million)				
2006	2007	2008		
-----	January / December	-----		
A. Total Market Size		15,082	17,323	17,034
B. Local Production		25,584	29,338	29,778
C. Total Exports		13,306	15,370	16,610
D. Total Imports		2,804	3,355	3,866
total Imports from U.S.		83	99	50
F. Exchange Rate: USD 1.00=Euros: 0.796 Euros: 0.730 Euros: 0.6803				

Source: French Customs/SCEES - French Ministry of Agriculture

Comments: In 2008, French imports of U.S. wine totaled 26.8 million Euros (\$39.4 million), representing 5 percent of total French wine imports by value. U.S. wines face strong competition from Italy, Spain and Greece, as well as from new world producers such as Australia, South Africa, and Chile. However, market opportunities exist for U.S. wines thanks in part to the "exoticism" and quality of the products and the promotional efforts made by American oriented restaurants in France.

The French are also significant consumers of spirits. In 2008, U.S. spirits exports to France were valued at 48 million Euros (\$70.5 million), and represented six percent of total French spirits imports of approximately 795 million Euros (\$1,169 million).

Opportunities exist for ethnic, new, and innovative U.S. beverages, particularly those linked with Tex-Mex foods. Sales of innovative beverages, such as beer with whiskey malt, are on the rise, as are sales of non-alcoholic beers and "panaches" (mixture of beer and lemonade).

France is the fifth largest European producer of beer with a total production of 17.8 million hectoliters. Ten percent of the production is exported. The French beer industry consists of six major breweries, 200 small breweries, and produces over 300 brands. Two American brewers are present in the French market, which are Anheuser-Bush and Miller. The French beer market is valued over two billion Euros (\$2.9 billion), representing about 12 percent of total alcoholic and non-alcoholic beverage sales and one percent of total food and beverage sales. Annual per capita beer consumption of 33 liters has declined by 26 percent during the last 25 years and is far behind that of Ireland, U.K., Denmark, Belgium, Spain, and Portugal.

4. Name of Best Prospect: **FRESH AND DRIED FRUITS, INCLUDING NUTS**
HS 08

	(USD Million)		
	2006	2007	2008
	-----	January / December	-----
A. Total Market Size	4,028	4,671	4,700
B. Local Production	2,467	2,740	2,810
C. Total Exports	1,813	2,011	2,120
D. Total Imports	3,374	3,942	4,010
E. Total Imports from U.S.	209	186	140
F. Exchange Rate: USD 1.00=Euros: 0.796	Euros: 0.730	Euros: 0.6803	

Source: French Customs/SCEES - French Ministry of Agriculture

Comments: Prime opportunities for U.S. suppliers are in off-season and extended-season sales and years of short French fruit crops. France is one of the most important markets for U.S. grapefruit (mostly from Florida), valued at 23 million Euros (\$34 million) in 2008. The U.S. market share for citrus fruits represents 25 percent of total French imports in value and 20 percent in volume.

France imports apples and pears in short crop years. There is also a niche market for berries, cherries and tangerines. In 2008, U.S. exports of berries to France doubled in quantity, compared to 2007 to reach 2720 tons.

The snack and nut product niche market is important for U.S. exporters, who profit by promoting their products as healthy and high-quality choices. Dried fruits and nuts, generally salted, are mainly consumed as snacks with aperitifs. Among the most popular snacks are cashews, almonds, pecans, hazelnuts and pistachios, all of which sell best when merchandised in bulk packages. French consumption of these products has doubled over the past seven years. France is a significant grower of walnuts, so French import demand is primarily determined by the size of the domestic crop. The United States remains France's leading supplier of in-shell walnuts whereas Moldova and China provided the bulk of shelled imports.

(For detailed market information, please see Post brief reports FR8028 and FR8019 on dried fruits and nuts, which can be found on the following websites:

<http://www.fas.usda.gov/gainfiles/200812/146306964.pdf>

<http://www.fas.usda.gov/gainfiles/200812/146306812.pdf>

5. Name of Best Prospect: **FRESH AND DRIED VEGETABLES**

Hs Code: 07

(USD Million)				
2006	2007	2008		
-----	January / December	-----		
A. Total Market Size		5,309	5,525	5,900
B. Local Production		4,851	4,935	5,103
C. Total Exports		1,992	2,426	2,419
D. Total Imports		2,450	3,016	3,216
E. Total Imports from U.S.		19	27	28

F. Exchange Rate: USD 1.00=Euros: 0.796 Euros: 0.730 Euros: 0.6803

Source: French Customs/SCEES - French Ministry of Agriculture

Comments: U.S. dried vegetables exports to France dropped 4.9 percent in value in 2008, compared to the previous year, to reach \$21 million. In 2008, rice imports from the United States swelled 83.4 percent in value to \$4.2 million. Significant opportunities exist for U.S. suppliers of dried beans, peas, and lentils.

Very few opportunities exist for U.S. fresh vegetables, except for green asparagus, and perhaps superior quality and off-season produced fresh vegetables, such as eggplant, zucchini, sweet peppers, and iceberg lettuce. Trends and increased consumption indicate a growing demand for fresh prepared vegetables (washed and cut) and many supermarkets have a special section for these types of products. There is also a growing demand for organic vegetables.

6. Name of Best Prospect: **MEAT AND OFFALS**

HS Code: 02

	(USD Million)		
	2006	2007	2008
----- January / December -----			
A. Total Market Size	9,761	10,966	11,325
B. Local Production	9,100	10,140	10,566
C. total Exports	3,554	3,974	4,740
D. Total Imports	4,215	4,800	5,499
E. Total Imports from U.S.	48	31	33
. Exchange Rate: USD 1.00=Euros:0.796 Euros: 0.730 Euros: 0.6803			
Source: French Customs/SCEES - French Ministry of Agriculture			

Comments: Opportunities in this market are limited given the import quota on hormone free meat and stringent EU veterinary regulations. The most prominent meat import from the United States is pork meat which was valued at \$32 million in 2008. Beef imports were valued at \$177,862, and horse meat imports amounted to \$97,000. Bison meat is growing in popularity, mostly of Canadian origin, but there might be opportunities for U.S. products. However, as a result of the enlargement compensation agreement between the United States and the European Union, the EU Regulations 617/2009 and 620/2009 set a new quota of 20,000 tons hormone-free high quality beef granted for import from the US to the EU with zero import duties. This quota runs from July 1 thru June 30 of the following year and should be in place for three years. After three years the quota is to be brought to 45,000 tons. France applied the EU regulation as of August 1, 2009, for one year, to be renewed. More information can be found at:

<http://useu.usmission.gov/agri/hqb.html>

SECTION V. KEY CONTACTS, AND OTHER RELEVANT REPORTS

For further information contact:

Office of Agricultural Affairs

American Embassy

2, avenue Gabriel - 75382 Paris Cedex 08

Tel: (33-1) 43 12 2264

Fax: (33-1) 43 12 2662

Email: agparis@usda.gov

Homepage: <http://www.usda-france.fr>

For more information on exporting U.S. food products to France, visit our homepage.

Reports identified below are relevant and complementary information to this report:

Report Number	Name	Hot link
FR8019	Product Brief: Nuts	http://www.fas.usda.gov/gainfiles/200812/146306812.pdf
FR8027	Product Brief: Sweet and Savory Snacks in France	http://www.fas.usda.gov/gainfiles/200812/146306952.pdf
FR8028	Product Brief: Dried Fruit	http://www.fas.usda.gov/gainfiles/200812/146306964.pdf
FR8029	Product Brief: Non-Alcoholic Beverages	http://www.fas.usda.gov/gainfiles/200812/146306963.pdf

FR8 030	Product Brief: Sauces, Condiments & Dressings	http://www.fas.usda.gov/gainfiles/200812/146306965.pdf
FR9 013	HRI Food Service Sector Annual	http://gain.fas.usda.gov/Recent%20GAIN%20Publications/HRI%20FOOD%20SERVICE%20SECTOR Paris France 7-20-2009.pdf
FR9 015	French Kosher Report	http://gain.fas.usda.gov/Recent%20GAIN%20Publications/French%20Kosher%20Report Paris France 7-17-2009.pdf
FR9 016	Retail Food Sector Annual	http://gain.fas.usda.gov/Recent%20GAIN%20Publications/RETAIL%20FOOD%20SECTOR Paris France 7-17-2009.pdf
FR9 020	Fast Food Sandwich & Snack Sector	http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Fast%20food%20Sandwich%20and%20Snack%20Sector%20 Paris France 8-20-2009.pdf
FR9 021	Food & Agricultural Import Regulations and Standards Annual Country Report	http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20-%20Narrative Paris France 8-28-2009.pdf

E48058	EU-27 Food & Agricultural Import Regulations and Standards	http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20-%20Narrative Brussels%20USEU EU-27 8-7-2009.pdf
E49021	EU-27 Wine Annual	http://www.fas.usda.gov/gainfiles/200903/146327359.pdf
E48029	Fishery Products EU Policy and Statistics	http://www.fas.usda.gov/gainfiles/200804/146294152.pdf

APPENDIX A : FOOD AND AGRICULTURAL TRADE SHOWS IN France In Calendar Year 2010

For Trade Shows in Calendar Year 2011, please visit FAS/Paris Homepage at:
<http://www.usda-france.fr>

TEXWORLD

International Textile Manufacturers

February 8-11, 2010

Paris - Le Bourget

Organizer: Messe Frankfurt France SAS

Tel: (33 1) 55 26 89 89

Fax: (33 1) 40 35 09 00

Email: texworld@france.messefrankfurt.com

Internet: <http://www.texworld.messefrankfurt.com/>

(Twice a year, every six months)

PREMIERE VISION

International Textile and Clothing

February 9-12, 2010 Show

Parc des Expositions Paris-Nord Villepinte

Organizer: Premiere Vision Salon

Tel: (33 4) 72 60 65 00

Fax: (33 4) 72 60 65 49

Email: info@premierevision.fr

Internet: <http://www.premierevision.fr/>

(Twice a year, every six months)

LE CUIR A PARIS

International Leather Products February
Show

February 9-12, 2010

Parc des Expositions - Paris Nord Villepinte

Organizer: SIC SA

Tel: (33 1) 43 59 05 69

Fax: (33 1) 43 59 30 02

Email: contactsic@sicgroup.com

Internet: <http://www.lecuiraparis.com/>

(Twice a year, every six months)

EUROPEAN SANDWICH & SNACK SHOW

Paris – Palais des Congres

February 10-11, 2010

Porte de versailles – Paris – Hall 5

Organizer: Reed Exposition

Contact: Jean-Baptiste Honore

Email: jean.baptiste-honore@reedexpo.fr

Internet: <http://www.sandwichshow.com>

(Annual Show)

SALON DU VEGETAL

Horticultural Trade Show

February 16-18, 2010

Angers

Organizer: BHR - Bureau Horticole

Regional des Pays de Loire

Tel: (33 2) 41 79 14 17

Fax: (33 2) 41 45 29 05

Email: salon@bhr-vegetal.com

Internet: <http://www.salon-du-vegetal.com/>

(Annual Show)

SALON INTERNATIONAL DE L'AGRICULTURE International Agricultural Show
Paris - Porte de Versailles
February 27-March 7, 2010
Organizer: Comexposium
Tel: (33-1) 76 77 11 11
Contact: Emilie Rodriguez
Email: Emilie.rodriguez@comexposium.com
Internet: <http://www.salon-agriculture.com/>

(Annual Show)

SALON MONDIAL DE LA BOULANGERIE, PATISSERIE, International Chocolate, Sugar,
GLACERIE, CHOCOLATERIE ET CONFISERIE Confectionery & Bakery Trade Show
Parc des Expositions - Paris-Nord Villepinte
March 6-10, 2010
Organizer: Europain Developpement/Comexposium
Tel: (33 1) 76 77 14 07
Fax: (33 1) 53 39 51 20
Email: europain@comexposium.com
Internet: <http://www.europain.com>

(Every two years for Europain and when not Europain:
The Annual Salon National de la Boulangerie/Patisserie/
Chocolate/Intersuc takes place)

SIREST IDEAS – Forum de l'Innovation Hoteliere Food Service Trade Show
Paris-Nord Villepinte
March 6-10, 2010
Organizer: GL-Events – Sepelcom
Tel: (33 4) 78 17 63 07
Fax: (33 4) 78 17 63 54
Email: stephanie.berghoff@sepelcom.com
Internet : <http://www.sirest.com>

(Biennal Show)

CFIA

Retail Food Trade Show

Carrefour des Fournisseurs de l'Industrie agroalimentaire

Parc des Expositions - Rennes Aeroport

March 9-11, 2010

Organizer: Agor/GL Events

Tel: (33 5) 53 36 78 78

Fax: (33 5) 53 36 78 79

Contact: Sebastien Gillet

Email: sebastien.gillet@gl-events.com

Internet: <http://www.cfiaexpo.com/>

(Annual Show)

SALON DES MARQUES DE DISTRIBUTEURS

International Private Label

ALIMENTAIRES - MDD RENCONTRES

Show for Foods, including Ethnic
and Halal foods

March 30-31, 2010

Paris - Parc des Expositions/ Porte de Versailles

Organizer: Agor - GL-Events

Tel: (33-5) 53 36 78 78

Fax: (33-5) 53 36 78 79

Contact: Gilles Ferrod

Email: gilles.ferrod@gl-events.com

Internet: <http://www.mdd-expo.com/>

(Annual Show)

FOIRE INTERNATIONALE DE PARIS

International Food, Beverages &
Tourism Fair

Paris - Porte de Versailles

April 29-May 9, 2010

Organizer: Comexposium

Tel: (33-1) 76 77 11 11

E-Mail: exposant.fdp@comexposium.com

Internet: <http://www.foiredeparis.fr>

(Annual Fair)

CARREFOUR INTERNATIONAL DU BOIS

International Timber Show

Parc de la Beaujoire - Nantes

June 2-4, 2010

Organizer: Carrefour International du Bois

Tel: (33 2) 40 73 60 64
Email: sam@timbershow.com
Internet: <http://www.timbershow.com>

(Biennial Show)

TEXWORLD
September 13-16, 2010
Paris - Le Bourget
Organizer: Messe Frankfurt France S.A.S.
Tel: (33-1) 55 26 89 89
Fax: (33-1) 40 35 09 00
Email: texworld@france.messefrankfurt.com
Internet: <http://www.texworld.messefrankfurt.com/>

International Textile Manufacturers

(Held twice a year – every six months)

SALON INTERNATIONAL DE L'ELEVAGE
(SPACE 2010)
Rennes - Carrefour Europeen
September 14-17, 2010
Organizer: SPACE
Tel: (33-2) 23 48 28 80
Fax: (33-2) 23 48 28 81
Contact: Valerie Lancelot
Email: v.lancelot@space.fr
Internet: <http://www.space.fr/>

International Trade Fair for
Livestock

(Annual Show)

PREMIERE VISION
September 14-17, 2010
Parc des Expositions Paris-Nord Villepinte
Organizer: Premiere Vision le Salon
Tel: (33-4) 72 60 65 00
Fax: (33-4) 72 60 65 49
Email: info@premierevision.fr
Internet: <http://www.premierevision.fr/>

International Textile & Clothing
Show

(Held twice a year – every six months)

LE CUIR A PARIS

Paris - Porte de Versailles

September 14-17, 2010

Organizer: Sic SA

Tel: (33-1) 43 59 05 69

Fax: (33-1) 43 59 30 02

Email: contactsic@sicgroup.com

Internet: <http://www.lecuiraparis.com/>

(Held twice a year - every six months)

International Leather Products

VAEExpo

Salon de la Vente a Emporter et de la

Restauration Urbaine et Nomade

Paris - Porte de Versailles

September, 2010

Organizer : Comexposium

Tel : (33 1) 49 68 54 22

Contact : Catherine Benhammou

Email: Catherine.benhammou@exposium.fr

Internet: <http://www.vaeexpo.com>

(Annual Show)

Ready-to-Eat & Snack Food Show

SALON INTERNATIONAL DE L'ALIMENTATION

(SIAL 2010) - USDA Endorsed

Parc des Expositions - Paris-Nord, Villepinte

October 17-21, 2010

Organizer: IMEX Management, Inc.

Tel: (704) 365 0041

Fax: (704) 365 8426

Email: kellyw@imexmgt.com

Internet: <http://www.imexmgt.com/shows/sialparis2010>

(Biennial Show)

International Food and Beverage Trade
Show - including In-Food and Organic
Sections

APPENDIX B : U.S. BASED STATE REGIONAL TRADE GROUPS

FOOD EXPORT USA - NORTHEAST

One Penn Center

1617 JFK Boulevard, Suite 420

Philadelphia, PA 19103

Tel: (215) 829 9111/Fax: (215) 829 9777

E-Mail: info@foodexportusa.org

Web: <http://www.foodexportusa.org>

Contacts: Tim Hamilton, Executive Director

Antoniya Gospodinova, Branded Program Manager

Joy Canono, Generic Program Manager

FOOD EXPORT ASSOCIATION OF THE MIDWEST USA

309 W Washington Street, Suite 600

Chicago, Illinois 60606-3217

Tel: (312) 334 9200/Fax: (312) 334 9230

E-Mail: info@foodexport.org

Web: <http://www.foodexport.org>

Contacts: Tim Hamilton, Executive Director

Michelle Rogowski, Deputy Director and Branded Program Manager

Teresa Miller, Generic Program Manager

SOUTHERN U.S. TRADE ASSOCIATION (SUSTA)

World Trade Center

2 Canal Street, Suite 2515

New Orleans, LA 70130

Tel: (504) 568-5986/Fax: (504) 568-6010

E-Mail: Susta@Susta.Org

Web: <http://www.susta.org>

Contacts: Jerry Hingle, Executive Director

Penney Lawrence, Branded Program Manager

Deneen Wiltz, Branded Program Director

Bernadette Wiltz, Deputy Director & International Marketing Director, Generic Program

WESTERN U.S. AGRICULTURAL TRADE ASSOCIATION (WUSATA)

4601 NE 77th Avenue, Suite 200

Vancouver, WA 98662

Tel: (360) 693 3373/Fax: (360) 693 3464

E-Mail: export@wusata.org

Web: <http://www.wusata.org>

Contacts: Andy Anderson, Executive Director
Ann Buczkowski, Branded Program Manager
Janet Kenefsky, Generic Program Manager

APPENDIX C : FRENCH GOVERNMENT AGENCIES

Agency responsible for French label/product ingredient regulations:

Direction Générale de la Concurrence, de la Consommation
et de la Répression des Fraudes (DGCCRF)
Ministère de l'Economie, des Finances et de l'Industrie
59, boulevard Vincent Auriol
75703 Paris Cedex 13
Tel: (33-1) 44 87 1717/Fax: (33-1) 44 97 3031
Internet: <http://www.finance.gouv.fr>

Agency responsible for promotion and control of food quality:

Direction Générale de l'Alimentation (DGAL)
Ministère de l'Agriculture et de la Pêche
251, rue de Vaugirard - 75015 Paris
Tel: (33-1) 49 55 4955
Fax: (33-1) 49 55 4850
Internet: <http://www.agriculture.gouv.fr>

For information on duties, taxes, and documentation:

Centre de Renseignements Douaniers
84, rue d'Hauteville
75010 Paris
Tel: (33-1) 825 30 82 63/Fax: (33-1) 53 24 6830
Email: crd-ile-de-france@douane.finances.gouv.fr
Internet: <http://www.douane-minefi.gouv.fr>

STATISTICS

TABLE A. KEY TRADE AND DEMOGRAPHIC INFORMATION FOR 2008

Ag. Imports from All Countries (1)	\$63.3 billion
U.S. Market Share (1)	1.4 percent
Consumer Food Imports from All Countries (1)	\$36.0 billion
U.S. Market Share (1)	0.7 percent
Edible Fishery Imports from All Countries (1)	\$5.7 billion
U.S. Market Share (1)	3.7 percent
Total Population/Annual Growth Rate (2)	64.3 million - Growth rate annual: 0.6%
Urban Population /Annual Growth Rate	49.5 million - Annual Growth rate: N/A
Number of Metropolitan Areas (3)	4
Size of the Middle Class (4)	85 percent of total population
Per Capita Gross Domestic Product	\$44,557
Unemployment Rate, incl. overseas territories	9.5 percent (*)
Percent of Female Population Employed (5)	47.3 percent
Exchange Rate: US\$1 = EURO	0.680

Footnotes:

(1) Statistics from the Global Trade Atlas from the Global Trade Information Services

(2) Preliminary figures

(3) Population in excess of 1,000,000

(4) Defining the middle class by excluding the poorest and the wealthiest, the middle class

represents 85% of the population

(5) Percent against total number of women (15 years old or above)

(*) Unemployment rate for France only: 9.1 percent

**TABLE B. CONSUMER FOOD & EDIBLE FISHERY PRODUCTS
IMPORTS
(In millions of United States Dollars, rounded to
the nearest million)**

Commodity	France Import Statistics from the World			France Import Statistics from the U.S.			U.S. Market Share		
	2006	2007	2008	2006	2007	2008	2006	2007	2008
Consumer Oriented Agric. Total	26,624	31,869	36,036	239	234	254	0.9	0.7	0.7
Fish & Seafood Products	5,045	5,357	5,724	207	202	212	4.1	3.8	3.7
Agricultural Total	36,319	43,946	52,040	485	556	649	1.3	1.3	1.2
Agricultural, Fish & Forestry	45,615	54,841	63,308	740	805	904	1.6	1.5	1.4

Source: Global Trade Atlas from the Global Trade Information Services.

TABLE C. TOP 15 SUPPLIERS OF CONSUMER FOODS & EDIBLE FISHERY PRODUCTS

FRANCE IMPORT STATISTICS

(In millions of United States Dollars, rounded to the nearest million)

CONSUMER ORIENTED AGRICULTURE						
Partner Country	United States Dollars			% Share		
	2006	2007	2008	2006	2007	2008
Belgium	4,507	5,404	5,909	16.93	16.96	16.40
Spain	4,555	5,120	5,817	17.11	16.07	16.14
Netherlands	4,252	5,099	5,760	15.97	16.00	15.98
Germany	3,978	4,762	5,435	14.94	14.94	15.08
Italy	2,685	3,231	3,845	10.09	10.14	10.67
United Kingdom	1,056	1,303	1,455	3.97	4.09	4.04
Morocco	555	741	815	2.09	2.32	2.26
Switzerland	429	542	706	1.61	1.70	1.96
Ireland	657	717	699	2.47	2.25	1.94
Poland	246	380	423	0.92	1.19	1.17
Portugal	318	388	410	1.19	1.22	1.14
Denmark	387	421	402	1.46	1.32	1.12
Turkey	193	232	346	0.73	0.73	0.96

Israel	264	358	297	0.99	1.12	0.82
United States	239	234	254	0.90	0.74	0.70

Fish & Seafood Products						
Partner Country	United States Dollars			% Share		
	2006	2007	2008	2006	2007	2008
Netherlands	434	493	511	8.60	9.20	8.92
Denmark	464	446	499	9.21	8.33	8.71
United Kingdom	478	496	487	9.47	9.25	8.51
Spain	354	413	406	7.02	7.72	7.10
Belgium	345	331	400	6.83	6.19	6.99
Germany	270	286	343	5.34	5.33	5.99
Sweden	289	317	318	5.73	5.92	5.56
United States	207	202	212	4.10	3.77	3.70
Madagascar	165	163	157	3.28	3.04	2.75
China	115	125	149	2.28	2.33	2.61
Cote d'Ivoire	74	104	132	1.46	1.94	2.31
Chile	123	136	132	2.43	2.55	2.30
Ireland	119	128	116	2.36	2.38	2.02
Ecuador	67	81	115	1.32	1.51	2.01
Morocco	88	92	112	1.74	1.72	1.96

Source: Global Trade Atlas from the Global Trade Information Services.

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